

## **REUNION PLANNING FOR THE REUNION COORDINATOR**

### **A Suggested Guide from Those Who Have Been There**

#### **I. General Advice**

- A. **Don't wait.** Start as soon as you accept the job as Reunion Coordinator (RC).<sup>1</sup> At the beginning, though, don't focus too much on all of the work to be done, decisions to be made, details to handle, and cracks for things to fall through. You are at the beginning of a long, detailed, and often tedious job. However, you are not the first and you don't have to invent a lot of stuff from scratch.
- B. **Lean on the experience** of those who have gone before you. The Association has a Reunion Standing Committee (RSC), chaired by the Reunion Coordinator Emeritus (RCE), and made up of members with hands-on knowledge of the reunion planning process. Create a group email address for that committee and use it. Give them periodic progress reports and invite feedback. Bounce ideas off of them. (When I<sup>2</sup> took on the Charleston job there were only seven months left until D-day. I immediately reached out to Duane Jensen, who sent me a zipped folder with 42 files documenting everything that had been done for the 2012 reunion. When I unzipped the folder I went instantly from "What do I do now?" to "Here's what I need to do now.")
- C. **Decide how you prefer to work**, solo or with a committee. There are pros and cons either way.
1. If you are confident of your own abilities and have lots of time you might prefer to go it alone. Working solo is very efficient in that you are not constantly having to build consensus between yourself and a number of other people, having to be always mindful of keeping others in the loop. Anyone who has worked on committees in any setting-- military, education, church, or civic-- knows that the cost in time and aggravation goes up as the square of the number of people involved. Working solo also eliminates the worry about whether or not tasks that have been farmed out are being done properly and on time. The downside of going it alone is exactly that; you are alone with all of the work and don't have the stimulation of regular discussions with people who can help you catch

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<sup>1</sup> Abbreviations are defined on first usage and pulled together in a "Terminology" section at the end for ease of reference.

<sup>2</sup> Throughout this document "I" refers to the webmaster, Chuck Johnson, who coordinated the 2013 reunion in Charleston and is this document's principal author. All mistakes belong to him.

things that are about to slip through the crack. (A smart, energetic, patient spouse who has the time and inclination to get involved is a huge plus.)

2. If you want to work with a committee, pick committee members whom you know to be competent and reliable. Don't get too hung up on finding people who live in or close to the venue city. Very little actually needs to be done on the ground there after the venue hotel is selected. Almost all of it can be done online and via email. It is much more important to get people whom you know will do the job completely, correctly, and on time.
  3. Look for natural ways to divide the workload that leave as little overlap and as few gaps as possible. For example, the RC might want to take personal charge of the venue hotel selection, with an assist from one or two people on the site visits. Major areas that could be farmed out might be activity and tour selection, finding a guest speaker, and setting up the hospitality room. Set progress dates in writing (email is fine) for any task to be done by someone else.
- D. **Do your business via email** and minimize the use of the telephone. That gives you a written record of who said what to whom, and when, so that you can refresh your own memory and the memory of others as the need arises.
- E. **Communications with members.** As of this writing (February 2018) our membership database is a spreadsheet with about 500 names. We have email addresses for about 335 and use snail mail for about 135. (The numbers don't plus because the spreadsheet has some names with no contact information at all. Those are the MIAs at 'Admin|Need Contact'.)
1. The database manager is already set up to print mailing labels for the snail-mailers and has been happy to handle those for the RC in the past. He tries to combine the reunion material mailing with one of the President's periodic updates in order to save postage.
  2. You will want to send out the emails yourself. If someone else does it for you, when people just click "Reply" all of the replies will go back to that third person, who then will have to forward them to you. It usually is pretty easy to set up group email lists from the membership database, depending on what email client you are using. Here is one way to do it; there doubtless are many others.
    - a. Get the database manager to email you a copy of the database. It is in Microsoft Excel (.xls) format. If you don't have Excel, the spreadsheets in the free, Microsoft-compatible Libre Office and

OpenOffice suites work very well. Just Google, download, and install one of them (I prefer Libre Office).

- b. Open the file, then rename and save it as your working copy. In your working copy delete all columns except last name and email. Sort it by email address and delete all rows with blank email addresses (those are the snail-mailers). Rename and save it., then rename and save it again.
- c. There are problems with trying to use a single group email address with 300-plus names. Your ISP probably would classify you as a spammer and reject your email or even shut you down completely. Get around that by creating a serially-named set of group email address folders. For example, reunion1, reunion2, . . . , reunion9. The easiest email client that I have found for doing this is Mozilla Thunderbird. It isn't my regular email client but for creating, populating, and using group email addresses I have not found its equal.
- d. Open one of your copies of the names and email addresses and cut-and-paste 35 or so addresses at a time into your group email address folders. Use cut-and-paste, rather than copy-and-paste, so you don't have to remember where you are in the source list. I could not find an easy way to concatenate (combine) name and email address, so I used just the email addresses. (There is a way to concatenate columns using spreadsheet functions but don't try it unless you are pretty good with spreadsheets already or have the time and patience to teach yourself.)
- e. To use this setup to send an all-hands email just compose your email and send it to reunion1. Go to your "Out" or "Sent" box and pull up the sent copy, select "Resend" and change the "1" in the email address to a "2" and hit "Send." Repeat through reunion9. It actually is quite quick and easy to do.
- f. Having only email addresses with no names can be a problem when you get bounced emails or return mail where people don't identify themselves. Most email addresses do not give you a clear idea who you are hearing from and replying to. When that happens open your list of just names and email addresses. Sort it by email address and it becomes a look-up table for finding the name for any email address.

## **II. Rough chronology of planning steps**

- A. As soon as you can after accepting the RC job, **reach out to the RSC** for a zipped folder with electronic copies of the various letters, forms, worksheets, lists, and other correspondence that have been used in other reunions. Begin by looking over just the file names to get an overview of where you are headed.
- B. **Select the specific dates** for the reunion by first determining if there are any major events or conditions that you need to work around. For example, for Charleston we settled on May 19-23 (Sunday to Thursday) because (a) Charleston weather usually is just about perfect in May; (b) Spoleto, an international performing-arts festival, was scheduled to run from May 24 to June 8 and fill every hotel in town; (c) the Atlantic hurricane season starts June 1 and runs through November 30; (d) midweek hotel nights are cheaper than weekend nights; and (e) flying in on Sunday is easier and sometimes cheaper than flying on a weekday.
- C. The best source of city-specific information about the venue city (VC) is its Convention and Visitors Bureau (CVB). Find its web page by entering “[VenueCity] Convention and Visitors Bureau” in the search box of any major search engine (Google, Yahoo, etc.). Call or email the person listed for convention and group planning and ask if they have someone on the staff who specializes in military reunions. If so, call that person and ask about local conditions and events that you need to take into account in selecting your reunion dates. He or she also should be able to give you information about support from local military bases, including contact information. Ask him or her to review your RFP and make suggestions before it goes out. This person can be enormously helpful, since he or she knows all of the players in the local convention industry and has helped with lots of military reunions.. If they do not have a military specialist, then talk to someone who routinely helps with group planning.
- D. After the reunion dates are set, look around on the CVB web page for a place to **submit a Request for Proposal (RFP)**; there almost certainly is one there somewhere. Call someone if there are parts of the form that you are not sure about, then fill it out and submit it. Be sure to mention that you are doing a military reunion, that it will include a sit-down banquet dinner, and that you will need a hospitality room for the entire time and one meeting room at two different times (Board of Directors (BOD) and all-hands meetings). The CVB will shotgun it to hotels, tour operators, restaurants, and other vendors and you will start getting replies almost immediately. This saves an enormous amount of time and gets you started right away on hotel selection.
- E. If there is **someone at the CVB who specializes in military reunions**, send that person an email with all of your contact information, the name of the

organization, and the dates of the reunion. Ask him or her to review your RFP and make suggestions before it goes out. This person can be enormously helpful, since he or she knows all of the players in the local convention industry and has helped with lots of military reunions.

- F. **Local military support.** Contact the Public Affairs Officer (PAO) of nearby military facilities about any available support (tours, static displays, short-term PX and Class 6 passes, etc.).
  
- G. **Financial management.** You will want to do an exemplary job of managing and documenting the reunion finances. You will have a fiduciary duty and if you are not certain what that means then you should Google it.
  - 1. **Rule number one:** do not co-mingle reunion finances with your own, which means do not run the reunion finances through your personal checking account.
  
  - 2. Get some **seed money**, say \$1,000, from the Association treasurer, since you will have to pay for some things before the reunion checks start coming in.
  
  - 3. Use that check to open a **checking account** in the name of the reunion; e.g., HMM-265 Reunion 2XXX. Banks vary in their requirements for opening accounts but they all have gotten tighter. Your best bet for a hassle-free experience is print the Certificate of Formation and IRS Determination Letter (bank will want EIN) from the 'Admin|Corporate Documents' menu on the Association's website, HMM-265.org. If you can get a **no-fee credit or debit card** on the reunion account it would be useful and worthwhile. You will be doing some point-of-sale payments, particularly as D-day gets closer: food and drink, hospitality room supplies, etc. A credit or debit card on the reunion account would keep you from having to use cash or your own credit card, which would complicate your financial record-keeping. Just be sure to incorporate all of the receipts into your records.
  
  - 4. Set up a spreadsheet for all of your checking account transactions. The spreadsheet should contain formulas to carry a running balance and each line should include validity cross-checks. You might start with an example from the RSC files. (If you need help, I taught both accounting and spreadsheets at the university level for 20+ years.)
  
- H. **Document management**

1. Try to **visualize the paperwork** you are going to accumulate and a filing system to keep control of it before you get buried in it.
  2. Create a **master email folder** to organize the hundreds of emails that you will be sending and receiving. You will add subfolders as the work unfolds.
  3. Get a good sized (8-16 gig) **thumb drive** for storing all of your electronic work product, including the stuff that you get from the RSC from past reunions. **Back up** your thumb drive regularly to off-site (cloud) storage, e.g., Dropbox or similar. If you use automatic backup software, set it to make continuous or at least daily backups of that entire thumb drive. If not, make it a habit to back up the thumb drive at the end of every work session.
- I. Start thinking and talking to people about a **guest speaker**.
- J. **Hotel selection**
1. **Review all of the proposals from hotels** and winnow them down to a handful of candidates for site visits. Eliminate those that are obviously unsuitable: too expensive, too far away, too cheesy, no banquet facilities or capabilities, no dining room, no real lobby, no pool, no fitness center, not smoke-free, etc.
  2. Think about the things that you want to be sure to find out on the site visit and make up a **site visit checklist**. You likely will have gotten one in all of the stuff from the RSC that you can use as a starting point.
  3. Plan and perform your **hotel site visits**. You should be able to do all of them in two days. Mark the hotel locations on a city map and determine an efficient order in which to visit them. Each hotel proposal will include contact information for someone in group sales. Contact that person and set up a date and time for a site visit. Ask the person at a hotel near the middle of your planned visit route if the hotel might comp you a room for the night. When you get back home send a short thank you to your contacts at the visited hotels.
  4. **Select the venue hotel** and let your VH contact know via email. Let your contacts at the other hotels know that they were not selected and thank them again for the time they spent with you.
- K. Decide **how many rooms you want to reserve**, which is the *toughest decision* you will have to make; it is fraught with uncertainty and risk. You risk reducing

the quality of the reunion experience for the members if you **underestimate** the demand. If that happens and the hotel sells out then you will not be able to get any rooms above your original block and will have to arrange for an overflow block elsewhere. On the other hand, if you **overestimate** then you run the risk of the Association having to pay for unused rooms if we fail to meet the contract. That could be ruinous for the Association.

1. How do you decide? Ask the RSC about attendance at the past few reunions, look at the geographic distribution of our membership relative to the VC, consider any other information that you think pertinent, make your best SWAG, and pull the trigger.
  2. It probably is best to aim a little low with an eye toward adding rooms to the contract if demand seems to warrant doing so. Make a strong pitch in your communications to the membership for everyone to book their rooms early if they plan to attend, so that you can get an early idea about adding rooms before the hotel starts to become fully booked. It costs the member nothing to make a reservation and it is not an absolute commitment; it a risk-free option that can always be canceled.
  3. If it starts to look like you need to add rooms to the contract, don't wait too long before you pull the trigger. (I dithered for one day too long in Charleston, the hotel booked another group that sold out the hotel, and I had to book an overflow block at another hotel.)
- L. The VH will send you a **proposed contract**. Read the contract very carefully. It would be a very good idea to forward a copy of the proposed contract to each member of RSC, all of whom will have had to sign a similar contract in the past, and ask for comments. Be sure that the contract addresses the following issues:
1. Number of rooms blocked for each night, total room nights blocked, and expected total room revenue to the hotel
  2. Facilities to be provided-- dates, and cost, if any, for banquet room, hospitality room, and meeting rooms
  3. Attrition percentage, which is the percent of the expected total room revenue that must be achieved in order to keep the Association from having to pay for unbooked rooms
  4. Reservation due date--unbooked rooms returned to inventory, attrition clause invoked, typically D minus four to six weeks
  5. Cancellation fees if entire event is cancelled

6. Force majeure (acts of God)
  7. Payment schedule
  8. Concessions (rights and benefits from Hotel to Group)
    - a. Approval to bring outside food and beverages, both alcoholic and non-alcoholic, into the hospitality room
    - b. Complimentary internet in all rooms (and hospitality room, if feasible)
    - c. “Shoulder periods,” two or three nights before and after the reunion dates when members can get the reunion rate, subject to availability, for those who want to arrive early and/or stay longer. Those nights should count toward the contracted total room nights and total room revenue.
    - d. Try to get one free room-night per some number of room nights occupied . You will need a room for your speaker, if you have one, or you might just have it credited to the Association’s master account.
  9. Try to get free ice and daily cleaning of the hospitality room in “Concessions” above. If they won’t go for that, have them put it in the contract as a paid service with a specified price. Otherwise, it will be a daily chore that you will have to do or arrange to have done by volunteers. You will have plenty to do without that.
  10. Insurance and indemnification–VC probably will require a liability insurance policy, with copy furnished upon contract signing. Event insurance is quite inexpensive. (Coverage for Charleston, including the serving of alcoholic beverages was obtained from <http://www.theeventhelper.com> for less than \$140.)
  11. Audio visual equipment availability and cost–Hotel price may be high so check local prices. (In Charleston we rented a large, flat-screen TV for showing looped Vietnam footage from Aaron Rents for a tenth of the hotel’s price. We could have bought the TV for what the hotel wanted for four nights usage.)
- M. The VH will set up a **group ID** with its own web address for making reservations, probably after the contract is signed. Send out an email **save-the-date** to the



membership email list giving the city, dates, the name of the hotel, and the information on how to make reservations. To save postage, get the President to put the information in one of the periodic updates that he sends out to the snail-mail membership list. Get the webmaster to post it on the Association's web page.

- N. Start working on the **schedule of activities**. If the VC was well chosen, then your problem won't be thinking up things to do, it will be narrowing the selection from a huge variety of possibilities. You want to schedule fun, interesting things every day without over-filling the days. People want some time on their own and many of our members don't have the mobility and stamina to do too much in a day. Start by going through the proposals that resulted from the RFP. If you need more, search online and ask specific vendors that interest you to submit proposals. Contact those that look like a good fit for our group and work out specifics. Be sure to find out about accessibility for people with mobility issues. For example, is it wheelchair and scooter accessible? Can wheelchairs and scooters be carried on the busses? How much walking is involved?
- O. **Select the activities** you want to include and sign contracts with the vendors.
- P. **Entertainment**. Decide whether or not you want any kind of entertainment, find it, and contract for it.
- Q. **Arrange the banquet**
1. The most convenient location, by far, will be the venue hotel. Other places will be available, of course, perhaps some with great reputations. You will have to decide if the great reputation is worth dealing with the logistics and cost of getting people there and back. Our members generally come to visit with each other and likely will not remember what or where they ate.
  2. Get with the catering manager and pick the menu. People really like having choices, so try to offer perhaps a beef, chicken, seafood, and vegetarian entree. Get a total, all-inclusive price for each choice, rather than using a blended price for all. People know that beef costs more than chicken and some chicken eaters will get all mule-lipped about subsidizing someone else's filet.
  3. With menu choices there comes the inevitable problem, after everyone is seated, of letting the wait staff know who ordered what. See "Physical Preparations, Nametags" below for a good suggestion.

R. **Prepare and send out** the reunion information materials to the membership. These typically have consisted of a cover letter from the President and the RC, a schedule of at least the activities that the members will pay for, with a descriptive paragraph for each activity, and a registration form. The registration form should include menu options and prices for the banquet. This is your first and best shot at selling the reunion to the members, so use it well.

1. The cover letter should make a strong pitch for everyone to reserve rooms early, so the RC can get a supplementary block if needed. Point out that we had to get overflow rooms in another hotel in Charleston.
2. Each vendor likely has already sent you something that you can use as a starting point for the event descriptions.
3. Include spaces on the registration form for making a tax-deductible contribution to the Association's funeral fund and for describing any mobility or dietary issues. Again, you might start with the examples provided by the RSC.

S. **Guest speaker or honored guest**

1. Send an invitation letter to your first choice of guest speaker. Use nice paper and envelope and put the Association's logo and your own address in the letterhead. Tell that person why you think he or she would be a good fit for the HMM-265 Veterans Association. If you don't get a reply within a few weeks send him or her a short note or email with a copy of the original letter attached, saying that you just want to make sure he or she received our invitation and reiterating how honored we would be to have him or her speak to us.
2. If you get turned down, send a letter out right away to your second choice, etc. Keep at it until you get a speaker or start running out of time.
3. If you get a speaker you need to be able to comp him or her a room. Most hotels will comp one room for each multiple of some number of paid rooms. See prior discussion of hotel contract.
4. Be thinking about a fallback position in case you can't get a speaker. Indeed, it is not absolutely necessary that you have a speaker. (Often a guest speaker is like the corpse at a funeral or the valedictorian at a graduation: necessary to validate the occasion but no one expects him or her to say anything really important.) You could get some kind of entertainment or perhaps an informational presentation.

## T. **Receiving registrations.**

1. Prepare the worksheet that you will use to record registrations so it will be ready when registrations start coming in. Your best bet is Microsoft Excel or an Excel-compatible product such as the free, open-source Libre Office and OpenOffice suites. You will want a column for each item of information you want to collect. You also will want to build in a few cross-checks, such as making sure that the charges for the chosen events add up to the amount of the check. Once again, the quickest way to do it would be to take a spreadsheet from the RSC information, erase the data (but not the formulas) and change column headings. A little spreadsheet experience is nice to have, but not essential. Again, I will be glad to help you if you need it.
2. Open and record each day's registrations as they come in. That way you can catch errors and omissions and get them corrected as you go along.
3. Batch the checks and make bank deposits as appropriate. Keep a copy of the deposit slip, including the list of checks, and attach the voucher from the cashier after the deposit has been made.
4. You likely will get a slew of registrations in the first couple of weeks. These are the hard-core attendees; if they are still alive and reasonably mobile on D-day then they plan to be there. It will taper off pretty quickly, however. Most people procrastinate, particularly when it involves laying out several hundred bucks.
5. Get periodic pickup reports from your contact at the VH showing how many rooms are booked to date. Use these to start thinking about the need for a supplementary block of rooms. Make a reminder pitch to all hands asking everyone to please book rooms early, even if they don't want to send in the registration and payment right now, so that more rooms can be added, if needed, before the hotel fills up.

U. **As D-day approaches**, put out an all-hands email every month or so to remind everyone that time marches on. It's easy, free, and likely will stir a few members to action.

## III. **Physical Preparations**

### A. **Name tags**

1. The easiest way to do name tags is to work with someone at one of the large office supply stores (Office Depot, Staples, etc.). They have all of

the supplies and also the ability to print name tags in various formats from a text file that you create. Get the file requirements from them before you start the file. The service is not expensive and saves untold aggravation.

2. With menu choices there comes the inevitable problem, after everyone is seated, of letting the wait staff know who ordered what. One approach that works very well is to put a color-coded sticker on the back of every name tag holder. Remind everyone to wear, or at least bring, their name tags to the banquet, and place them face-down in front of themselves after they are seated. (The office supply store that does the name tags will have inexpensive packets of stick-on dots in different colors.) Email the code to the catering manager beforehand so that he or she can pre-prief the wait staff. Both the catering manager and the wait staff will love it and everyone will be served more quickly.

#### **B. Hospitality room**

1. Booze, wine, beer, soft drinks, and bottled water. Be conservative with prepurchases. It's better to have to make a couple of runs to restock than to have a lot of excess to deal with at the end.
2. Mix and other bar supplies - tonic, club soda, tomato juice, corkscrew, olives, limes, lemons, sweet and dry vermouth, a couple of pitchers
3. Snacks (junk food) - chips, nuts, salsa, etc. Again, don't get too much up front; someone can always make resupply runs and you don't want a lot of that stuff left over.
4. Supplies - napkins, paper towels, cups, plates, utensils, knife for cutting lemons and limes, cutting board, shot glass, cocktail shaker
5. Coolers - see if local attendees can bring coolers; much easier that way

#### **IV. Post-Reunion Activities**

- A. **Thank-you notes** as appropriate (speaker, hotel, others who helped a lot)

#### **B. Finances**

1. Make sure all checks have been deposited, all bills paid, and records updated
2. Write a check to the HMM-265 Veterans Association, Inc., for the remaining balance and send it to the Association's treasurer along with the

bank statements and a hard copy of all records related to cash management.

3. Destroy remaining checks and credit/debit cards
4. Close the account at the bank when the last check has cleared

C. Put **paper files** in folders and **computer files** on a labeled thumb drive, then put it all in a labeled box and stick it in a closet. In a year or so move it to the attic and forget about it. Your kids can deal with it after you die.

V. **Terminology.** These terms appear throughout the document and the abbreviations are defined on first usage. They are pulled together here for ease of reference.

BOD Board of Directors  
CVB Convention and Visitors Bureau  
D-day Date reunion begins  
PAO Public Affairs Officer (military point of contact for the public)  
RC Reunion Coordinator  
RCE Reunion Coordinator Emeritus  
RFP Request for proposal  
RSC Reunion Standing Committee  
VC Venue city; i.e., the city in which the reunion is to be held  
VH Venue hotel